



Financials for Office 365

Your Microsoft Cloud Accounting Software
from \$29 per user/month + GST

www.o365financials.com

Get started from
\$29 per month
+ GST



Financials for Office 365

"Faster, simpler tools to drive your business.
Available anytime and anywhere."

	Lite Edition	Standard Edition	Premium Edition
Users			
Number of Users	Up to 3	Up to 15	Up to 150
Full Access User + GST	\$29 user/month	\$99 user/month	\$159 user/month
Limited Access User	-	\$49 user/month	\$49 user/month
External Accountant	1 FREE login	1 FREE login	1 FREE login
Setup			
Services + GST	\$0 Simple Setup	\$2,990 Starter Pack	\$9,990 Starter Pack
Features			
Core	Quotes, Invoicing, Purchasing, Payables, Basic Inventory, Fixed Assets, Bank Reconciliation, General Ledger	Everything in Lite + Options include Advanced Inventory, Basic Warehousing, Job Costing, Service Management, and Manufacturing	Everything in Standard + Options include Advanced Warehouse Management, Payroll, Customisations, and Integrations
Support			
Unlimited web support (Email)	Y	Y	-
Level 1 Support	Refer to your advisor	Refer to your advisor	Refer to your advisor
Level 2 Support (phone direct) + GST	-	\$35 per 10min.	\$35 per 10min.

What is Financials for Office 365?

- A business solution powered by Microsoft Dynamics, used by millions of people worldwide
- Big business software designed for small business use
- Financials for Office 365 completes your Microsoft business solution in-a-box.

> Testimonials

Shortys Liquor, a leading alcohol and beverage distributor streamlined their business processes into one new solution with Financials for Office 365 and integrated with their Magento website to manage website orders and enable customer self-service.

Easy Cloud Accounting

Get Started Today

Financials for Office 365 is more than just accounting software. With integration to other Microsoft Office applications, it is your complete business solution in the cloud. Financials for Office 365 is a simple to use software package for small and growing businesses. Whether you are a first time user or have outgrown your existing business applications, give Financials for Office 365 a try.

Is Here >

Lite Edition

\$29 user/month

+ GST

Standard Edition

\$99 user/month

+ GST

Premium Edition

\$159 user/month

+ GST

Free External Accountant Login

Give your accountant instant access to data. With Financials for Office 365 your accountant will have access to the same information in the same system as you so your accountant will no longer need to wait to receive your business data.

Do more with one system. Drive productivity & rely on accurate data.

- Invoice customers on the go by billing customers on the spot. Invoices post directly to your General Ledger saving time and money.
- Enjoy real time reporting with powerful insight and financial reporting functionality.
- Work anywhere, anytime and be in control of your business. Ideal for financials, distribution, manufacturing project costing, not-for-profit and government industries.
- Scalability: Simple to use yet grows with your business. Financials for Office 365 is designed to be the only business software you will use.
- One cloud software package: means no more data duplication and no more endless spreadsheets.
- Integrates with your Microsoft solutions: Maximise the return on your investment on familiar Microsoft products you know and use and switch on features as you need them.

“The Magento compatibility and integration means we get a complete ecommerce and back-end system with one source of data.”

— David Short, CEO Shorty's Liquor

Watch the Shortys Liquor customer review video at www.o365financials.com

Financials for Office 365 Features

Add Customers

Add customer details including their address, contact person, phone number, email address, payment details, discounts, bank accounts and add notes. See payments due, payments history and transactions by period reports.

Add Suppliers

Add vendor details including their address, contact person, phone number, email address, bank accounts, invoicing and payment details, currency code. See payables owed and payment history reports.

Sale Items

Create inventory or service items, add unit of measure, price, item picture, and item discount group and costing methods where appropriate. Option to enable stockout warning and prevent negative inventory.

Sales Quotes

Include requested delivery date, shipment date and sales invoice due date. Add line discounts or overall invoice discount amount. Save quote as PDF document and send to customer via email.

Create Sales Credit

Create corrective sales credit or adjustment to sales invoice.

Bank Reconciliation

Import your bank statements and automatically match the records against open bank entries in your software. Any unmatched lines are added to the end of the statement for your attention.

General Ledger

Comprehensive financials including chart of accounts, general journals, g/l budgets, and reporting including trial balance.

Create Purchase Credit

Correct and create a new open version of a posted purchase invoice and make the correction and cancel the original posted purchase invoice.

Email PDF Business Documents

Standard feature.

Accounts Payable

Setup and maintain vendors, and manage payables.

Create Sales Invoices

Convert sales quote to sales invoice or create new sales invoice. Ability to copy document lines from another sales document or copy a sales invoice to quickly create a similar document.

Multi-Currency

Manage receivables and payables with multiple currencies.

Basic Inventory

Set up your items and specify their unit of measures (e.g. piece, kilo, pack, hour), costing method (e.g. LIFO, FIFO, Standard, Average), unit cost and price. View your current stock levels and transaction history.

Fixed Asset Management

Keep track of fixed assets such as furniture, vehicles and equipment. Manage asset's location, depreciation, warranty and maintenance details.

GST/BAS

Includes all Australian GST codes and a fully compliant Business Activity Statement that reconciles to your General Ledger.

EFT

Simplify electronic payment process to your vendors. Once the vendor payment batch has been checked, an Australian Banking Authority file (aba file) is created which can be uploaded to any Australian banking software.

Bank Account Management

Create and manage multiple bank accounts across different currencies.

Real Time Reporting

Wide set of business insight and reporting functionality. Powerful financial reporting to extract the most essential business data to efficiently monitor the health of the business and provide valuable input for the business decision makers and accountants.

Create Purchase Invoices

Choose from list of vendors. Option to insert recurring purchase lines such as for monthly replenishment order. Ability to copy document lines from another purchase document or copy a purchase invoice to quickly create similar document.

Basic HR

Add employees with relevant information such as job title, name, address, gender, contact details, employee picture, status, qualifications, employment date, probationary end date, tax file number and salary package. Other information include confidential information, absences.

Accounts Receivable

Setup and maintain customers, and manage receivables.

Contact your Financials for Office 365 Partner:

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